Customer Requirements Response: Accepted, Reworded - LRD

Scope

This process defines how the Project Manager interacts with customers and stakeholders for a specific project, and the decision-making process involved.

Policy

ER 5-1-11[http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf]

ER 37-1-26[http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf]

Responsibility

The Project Manager is responsible for serving as the **project's** primary **Response: accepted reworded** USACE point of contact with the customer(s) and working with them to develop the scope of the project. One of the PM's greatest challenges is to balance these interests and develop a scope of work and set of **achievable Response: accepted, reworded** project objectives that meets or exceeds the customers' stated and implied expectations, while taking into account the needs and expectations of other stakeholders, statutory, regulatory, and policy guidance.

Before the scope can be defined, the Project Manager must understand who the customer is, and how the **customer Response: reworded** will make decisions. Furthermore, customers and other stakeholders may have competing or conflicting interests. The PM must understand customer/stakeholder needs and expectations, and translate them into specific deliverables.

The PM also works with the customer(s) and leads the PDT **(the customer is a member of the PDT)Response: Accepted reworded** in determining how decisions will be made and how funding will be provided for the project. The customer(s) is known at the start of the project **may have Response: accepted** some degree of decision-making authority on the project, and may be responsible for providing all or some project funds.

Stakeholders may provide input on project scope and schedule, but may or may not have decision authority, and may or may not fund the project, but have an interest in the project outcomes.   Not all stakeholders may be known at the start of a project.

Distribution

Project Delivery Team (PDT)

Project Manager (PM)[*]

Ownership

The BP/P2 Program Office is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

System References

Acronyms and Glossary[REF1001]

Advanced Acquisition Strategy[PROC1006]

Change Management[PROC1004]

Change Management Plan[REF1025]

Communications Plan[REF1022]

PMP Approval Process[PROC1018]

PMP Development[PROC1012]

PMP/PgMP Content[REF1018]

Quality Management Plan[REF1024]

Risk Management Plan[REF1023]

Activity Preface

This process is **first Response: Sentence reworded to incorporate idea.** performed after a new project is identified, and prior to formulation of the PDT. This process may also be conducted iteratively as a part of the PMP development and approval process.

If the PDT is already established, the PM acts in conjunction with the rest of the PDT.

After the customer scope is defined, the project manager returns to the process from which he came. These processes would include *PMP Development[PROC1012]* and *PMP Approval[PROC1018]*, and *Change Management[PROC1004].*

Project Manager (PM)

1. Facilitate defining the customer's needs and expectations for the project.

   Initial contacts will include general discussions Response:accepted on scope, key deliverables, related goals, criteria, available resources, schedule requirements, quality expectations, risk analysis **make sure all constraints or etc.Response: Rejected**, preferred acquisition method (refer to *Advanced Acquisition Strategy[PROC1006])*, procedures to change the project (refer to *Change Management[PROC1004])*, and other customer

conditions and preferences that may impact the way in which the project is executed. **If the PDT has not been established, this process may include coordination with Subject Matter Experts as required. Response : Accepted but added to activity preface**

Ensure customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority, e.g., **agency policy reviews Response: rejected reworded**, work allowances, directives, etc.

2. Identify stakeholders, and define how the customer and stakeholders will be involved throughout the project.

3. Work with the customer(s) to determine their role in the decision-making process and how funds will be provided.

Determine who**, if anyone** will sign the Project Management Plan (PMP) for customer and approve changes to it.

Refer to *PMP Approval[PROC1018]*.

5. Facilitate development of customer's portion of Communications Plan.

Refer to *Communications Plan[REF1022]***.**

6. Discuss potential risks with customer.

Refer to *Risk Management Plan[REF1023]*.

7. Finalize draft scope of work.

Include consideration of the customers' needs and expectations, cost and schedule requirements, quality objectives, special technical requirements and unique criteria, and the decision making/change approval process for the project. Work closely with other members of the PDT (if established) to ensure all necessary items are addressed and issues resolved.

Ensure customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority, e.g., VTC fact sheets, work allowances, directives, etc.

8. Enter synopsis of customer scope in P3e as a Notebook Item.

If detailed scope is different than the synopsis, goto task #9. Otherwise, end of activity.

9. Attach detailed scope as a reference document in P3e.

End of activity.

Start

Project Mgr (PM)

– Facilitate defining customer's needs & expectations for project. (1)
– Identify stakeholders, & define how cust & stakeholders will be involved throughout project. (2)
– Work with customer(s) to determine their role in decision-making process & how funds will be provided. (3)
– Determine who will sign Project Management Plan (PMP) for cust & approve changes to it. (4)
– Facilitate development of customer's portion of Communications Plan. (5)
– Discuss potential risks with cust. (6)
– Finalize draft scope of work. (7)
– Enter synopsis of cust scope in P3e as a Notebook Item. (8)

Detailed scope is different than synopsis?

Y

N

End

Project Mgr (PM)

– Attach detailed scope as a reference document in P3e. (9)

End